



E-PCS

Quick tour

A screen by screen overview guide to the
Electronic Proposal Clearance System

Office of Research Services and Administration
University of Oregon

This slideshow is an overview of the features and capabilities of the Electronic Proposal Clearance System. It addresses entering and customizing the system, navigation, and explores some of the basic functions.

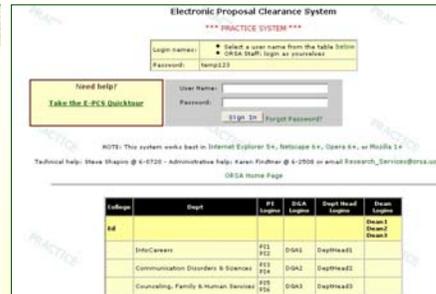
It does not address content issues. For help with content issues, please refer to the full User Manual

Quicktour instructions

- Close this window to exit the tour, you will be returned to the E-PCS system
- This Quicktour is not comprehensive. Read the User Manual for complete information.
- Click a subject in the left pane to advance from slide to slide or use the  arrows below

This slide show was optimized for Netscape version 4 or higher. If you are able to use Internet Explorer version 6 or higher, you will be able to resize the frames.

Login Screen



Production System

Enter your name and password

If you need help with logging in, select the situation that applies to you

Practice System

Choose a user role from the table on the screen.

The password for all users is **temp123**

Enter your user name and password.

If this is your first time logging in, use the User Name and Password sent to you by ORSA. If you need help with a first time login, use the second link of the help section.

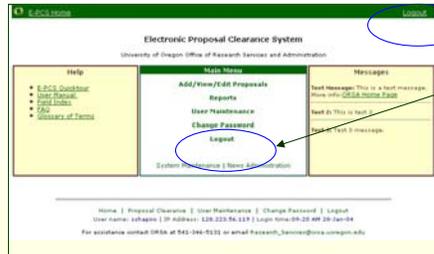
If you have forgotten your password, click on the “Forgot Password” link.

If you have forgotten both your user name and password, please contact ORSA’s Technical support @ 6-5131.

The “Take the E-PCS Quicktour” link in the help box leads to this slideshow.

Using the practice system, you can simulate any of the roles within E-PCS. Depending on your role, some buttons and fields may or may not be available. Using the practice system, you can simulate the proposal process from creation to final approval.

Logging Out



A logout link is available on the upper right corner of every screen and as an option on the main menu



Always log out after you are done



You can log out from any screen within E-PCS. For security reasons, it is important to remember to log out before shutting down your browser. If you do not log out, somebody can sit down at your computer, start up your browser and possibly be able to log into your session.

It is always a good idea to log out from any secure connection, such as banking applications and E-PCS, and then shut down and restart your browser before surfing to other pages.

Main Menu

Need help?
Help is also available while preparing a proposal record

E-PCS Main Menu

Look here for announcements and system messages

The screenshot shows the E-PCS Main Menu interface. At the top, it says 'E-PCS Home' on the left and 'Logout' on the right. Below that is the title 'Electronic Proposal Clearance System' and the subtitle 'University of Oregon Office of Research Services and Administration'. The main content area is divided into three columns: 'Help', 'Main Menu', and 'Messages'. The 'Help' column contains links for '12 Step Getting Started Guide', 'E-PCS Visual Quicktour', 'Complete User Manual', 'Frequently Asked Questions (FAQ)', 'Helpful Tips', 'Glossary of Terms', 'Field Index', 'Required Fields', 'Links', and 'Wishlist'. The 'Main Menu' column contains links for 'Add/View/Edit Proposals', 'Reports', 'User Maintenance', 'Change Password', and 'Logout'. The 'Messages' column is currently empty. At the bottom of the page, there is a footer with navigation links: 'Home | Proposal Clearance | User Maintenance | Change Password | Logout'. Below that, it displays user information: 'User name: zshapiro | IP Address: 128.222.56.119 | Login time: 01:29 PM 08-Mar-04'. The final line of the footer provides contact information: 'For assistance contact ORSA at 541-246-5131 or email Research_Services@orsa.uoregon.edu'. Red arrows point from the annotations to the 'Help' column, the 'Main Menu' column, the 'Messages' column, and the footer text.

Text menu

The main E-PCS menu. From here you can access your proposals, run reports, change your user name and e-mail preferences, change your password, or logout. The second row shows that we are recording your user name, your computer's IP address and the last time you logged in.

The very last line tells you how to contact our office if you have trouble, and is available on every screen of the system.

User Maintenance



The screenshot shows the 'E-PCS: User Maintenance' page. It contains a form with the following fields:

Name: Steven Shapiro	Work Phone: 5413460720
Address: 1400 Millrace Dr., Suite 106	Home Phone:
5219 University Of Oregon	Mobile Phone:
City: Eugene	Fax:
State: OR	Email: Steve_Shapiro@ORSA.uoregon.edu
Zip: 97403-5239	

Below the form, there is a section for 'User name' with a text input field containing 'ESHAP170'. There are also checkboxes for 'Restrict access to this system from UO campus computers only' (set to 'No') and 'Notify me after all approvals are received' (unchecked).

Annotations with arrows point to:

- The 'Name' field: 'You can change your user name'
- The 'Email' field: 'Your personal information is obtained from Banner. If it is not correct, it has to be changed in Banner'
- The 'Notify me after all approvals are received' checkbox: 'Control your e-mail volume and change security options.'

At the bottom of the page, there is a footer with navigation links: Home | Proposal Clearance | User Maintenance | Change Password | Logout. It also includes the user name 'eshapiro', IP address '128.223.56.119', and login time '09:20 AM 28-Jan-04'. A note at the bottom states: 'For assistance contact ORSA at 541-346-5231 or email Research_Services@orsa.uoregon.edu'

If you are a person authorized to approve proposals, you will also be able to assign delegates on this page.

On the User Maintenance screen, you can change your User Name (yes, it can have spaces) and E-PCS specific system information. All of the other information is derived from your Human Resources entry in Banner. If it is not correct, it must be changed in Banner.

If you do not anticipate using the system from off campus, please leave the "Restrict access" setting as "Yes."

The other checkboxes enable you to control how much e-mail you will receive as your proposal goes through the approval process. PIs and DGAs will always be notified immediately if anyone declines to approve a proposal they are involved in.

Information can not be changed in the practice system.

Proposal Menu

The screenshot shows the 'E-PCS: Proposal Clearance' interface. At the top, there are navigation links: 'Add New Proposal', 'Manage Templates', 'View Old PPS Information', and 'Search for proposals'. The 'Search for proposals' link is circled in blue. Below the navigation is a search bar with a 'Search' button. The main content is a table of proposals with columns: 'EPCS #', 'Grant #', 'Title', 'PI', and 'My Role'. The table contains 20 rows of data. Annotations with arrows point to various elements: 'Add New Proposals' points to the 'Add New Proposal' link; 'Status Key' points to the status indicators (In Progress, Finalized by PI, Approved by ORSA) above the table; 'Clickable links to proposals' points to the 'EPCS #' column; 'Grant Number, if known' points to the 'Grant #' column; 'More proposals, if any' points to the 'NEXT' link at the bottom of the table; 'Use search function to filter the list' points to the search bar; and 'Your role on each proposal' points to the 'My Role' column.

EPCS #	Grant #	Title	PI	My Role
205	TBA	text	Ablow, Jennifer	View Only
204	TBA	text	Ablow, Jennifer	View Only
203	TBA	text	Dose, David	View Only
202	TBA		Dose, David	View Only
201	TBA		Ablow, Jennifer	View Only
200	TBA		Ablow, Jennifer	View Only
199	TBA		Ablow, Jennifer	View Only
198	TBA		Ablow, Jennifer	View Only
197	TBA		Ablow, Jennifer	View Only
196	TBA		Ablow, Jennifer	View Only
195	TBA		Ablow, Jennifer	View Only
194	TBA		Ablow, Jennifer	View Only
193	421590		Ablow, Jennifer	View Only
192	421590		Ablow, Jennifer	View Only
191	TBA		Ablow, Jennifer	View Only
190	TBA		Adams, Karalia	View Only
189	TBA	This is a test proposal.	Ablow, Jennifer	View Only
188	TBA		Dose, David	View Only
187	TBA		Dose, David	View Only
186	TBA	text	Ablow, Jennifer	View Only

Here you can add new proposals and templates; and edit proposals currently in progress. The proposal numbers are the links to your proposals. You will only be able to see proposals that you are affiliated with.

Proposals will remain available indefinitely, if you find that you have too many proposals on your menu, use the search criteria to reduce the number of visible choices.

Proposals that were created before the E-PCS system became available can be accessed by clicking the 'View Old PPS Information' link. The exact date will be specified on the web site.

Searching for a proposal

◆ Search for proposal: (☐ - In Progress, ■ - Finalized by PI, ☑ - Approved by ORSA)

EPCS #: _____ PI Last Name: _____ Created: Status:

EPCS #	Grant #	Title	PI	My Role
<input type="checkbox"/> 205	TBA	test	ifer	View Only
<input type="checkbox"/> 204	TBA	test	ifer	View Only
<input type="checkbox"/> 203	TBA		Dose, David	View Only

If your list of proposals gets too long, you can filter it via several criteria:

- The proposal number
- The PI's last name
- How recently it was created
- Its status (In progress or Finalized)

You can specify a variety of criteria to search for proposals in progress: The proposal number, the PI's name; how recently it was created, or whether it is in progress or finalized.

Add New Proposal

If you are a
Principal
Investigator:

you can start new
proposals only for
yourself.

If you are a grant
administrator:
you can start a
proposal for any PI

In either case, you
must select the
submitting unit and
what type of
application this is

The screenshot shows the 'E-PCS: Add New Proposal' web form. It has a green header with 'E-PCS Home' on the left and 'Logout' on the right. The main content area is titled 'E-PCS: Add New Proposal'. It contains three sections: 1. 'Add new proposal:' with a 'Submitting Unit' dropdown menu (selected: '221100 AAA, Office of the Dean'), a 'PI' search field (containing ', Eric - Rsch Inst of Molecular Bi'), and an 'Application Type' dropdown menu (selected: 'New') with an 'Add Proposal' button. A note below states: '* If the submitting unit is not listed, stop and contact Research Services immediately.' 2. 'Add new proposal from template:' with a 'Template' dropdown menu (selected: 'test') and an 'Application Type' dropdown menu (selected: 'New') with an 'Add' button. 3. 'Return to Proposal Clearance' with a horizontal line. At the bottom, there is a footer with navigation links: 'Home | Proposal Clearance | User Maintenance | Change Password | Logout', user information: 'User name: sshapiro | IP Address: 128.223.56.119 | Login time: 01:44 PM 08-Mar-04', and contact information: 'For assistance contact ORSA at 541-346-5131 or email Research_Services@orsa.uoregon.edu'.

Principal Investigators may add new proposals only with themselves as the PI. Grant administrators can choose which PI will be leading the project.

You must also select the unit that is submitting the proposal and what type of application this is (new, renewal, continuation, etc).

If a unit or PI is not listed in the pull down choices, stop and call ORSA immediately.

Templates

E-PCS: Manage Templates

- ◆ **Add new proposal from template:**
Template:
Application Type:
- ◆ **Add new template:**
Submitting Unit: *
PI:
Template Name:
The template name should be a description of the template (i.e. NSF Template for Mol. Bio.)
* If the submitting unit is not listed, stop and contact Research Services immediately.
- ◆ **Templates List** Click on description to edit a template.

Template #	Description
6	test
- ◆ **Return to Proposal Clearance**

You can create templates containing information that tends to repeat over numerous proposals.

When it's time to start a new proposal, add it using the data in the template to avoid having to reenter the information by hand. You can create as many templates as you like. Templates can not be shared between different users.

Proposal Screen Areas

The screenshot shows the E-PCS Home interface for a proposal. At the top, there's a header with 'E-PCS Home | test' and a 'Logout' button. Below that is a navigation bar with tabs: 'Project', 'Funding Source', 'Proposal', 'Key Personnel', 'Collaboration', and 'Budget'. The 'Project' tab is active, showing a sub-menu with 'Compliance', 'Award', 'Space', 'Tech Transfer', 'Other UO Issues', 'Special', and 'Approvals'. The main content area contains various input fields and buttons. On the left, there's a vertical menu with icons for 'Check Proposal', 'Approve', 'Notes (0)', 'Print/View Proposal', 'Copy', and 'Delete'. Below this is a 'Help' section with links to 'User Manual', 'Field Index', 'Required Fields', 'Glossary', and 'Icons'. At the bottom, there are 'Save' and 'Section Finish' buttons. The text 'Help is a click or phone call away' is written vertically on the left side of the screenshot.

1. Header area: Identifies the Proposal Number, PI and title of the proposal
2. Utility Buttons: Hovering the mouse over the buttons on the screen will pop up an explanation box on most browsers (if javascript is enabled). These buttons will be different depending on your role in the proposal
 - Check Proposal: checks to confirm that required fields are filled in
 - Approve: Give your approval that the proposal is OK to submit. Your password is required to approve or decline to approve a proposal.
 - Notes: Create and read notes to yourself or other people about the proposal
 - Print/View: Create one long page for the proposal that can be viewed or printed
 - Copy: Create a new proposal based on this proposal
 - Delete: Marks the proposal as deleted. Users will no longer be able to access the proposal. If you need it back, contact ORSA
 - Help Section: Several different types of help are always available
 - Exit: Back to main E-PCS menu
3. Tabs: Each tab represents a proposal section (4) containing fields for you to enter. Hitting a tab will show that screen.
4. Main Area: The main data entry area for each tab.

Screen Icons

Legend:

- ? Context sensitive help
- This field is required before the proposal can be finalized
- View notes accompanying approval or decline
- View delegates
- Personnel information about person
- Send e-mail to person

?: Click for context sensitive help

Envelope: Open an e-mail link to the person

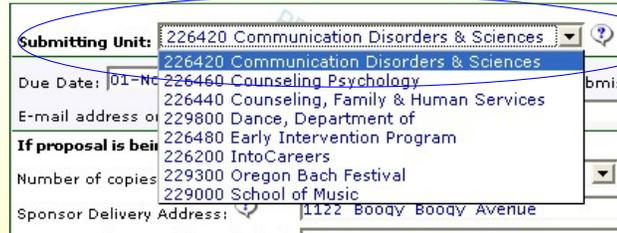
Magnifying Glass: Open person's information profile

Red Dot: this field is required before you will be able to finalize

Person: will popup a list of delegates for the approver

Note: Notes added by person who approved or declined to approve the proposal

Pulldowns



The image shows a screenshot of a web form with several fields. The 'Submitting Unit' field is highlighted with a blue oval and has a dropdown menu open. The dropdown menu lists the following options: 226420 Communication Disorders & Sciences, 226440 Counseling Psychology, 226440 Counseling, Family & Human Services, 229800 Dance, Department of, 226480 Early Intervention Program, 226200 Into Careers, 229300 Oregon Bach Festival, and 229000 School of Music. Other fields in the form include 'Due Date: 01-Nov', 'E-mail address of', 'If proposal is bei', 'Number of copies', and 'Sponsor Delivery Address: 1122 Booby Booby Avenue'.

You may only select from the choices listed in the pull down boxes. If you need to enter something that is not available, contact ORSA.

In the special cases of Funding Agency and Key Personnel, if the choice is not listed, you may select the See Below or Not Listed option and enter the information in the text box provided.

Uploading files

E-PCS Home | Project: based on Master Template for PI1 | Logout

EPCS#: 125
William PI1

Project | Funding Source | Proposal | Key Personnel | Collaboration | Budget
Compliance | Award | Space | Tech Transfer | Other UO Issues | Special | Approvals

Title: Project: based on Master Template for PI1 (255 char max)

COS Keywords: Find Keywords | COS Search

Abstract: [Upload an abstract](#) | [View uploaded abstract](#) Version: Draft

Progress Report / [Upload a description](#) | [View uploaded description](#) (19 KB) Version: Final

Project Start Date: 26-Jan-04 Project End Date: 27-Jan-04

Restricted Data: Proprietary Information:

Number of Students Paid Undergrad: 0 Grad: 0 (Students paid by grant money only)

Project Type: Instruction

If multiple project types, give the percentages that apply to each project type. Total should = 100%.

Research: 100 % Instruction: 0 % Public Service: 0 % Total: 100 %

Geographic area of impact (list largest entities affected: cities, counties, states):

Logged in as: dean2
Section Finished ** FINALIZED ** Updated: 2/23/04 3:08 PM (DGA4)

For assistance contact ORSA at 541-346-5131 or email Research_Services@orsa.uoregon.edu

You can upload files from your workstation or network disk drive.

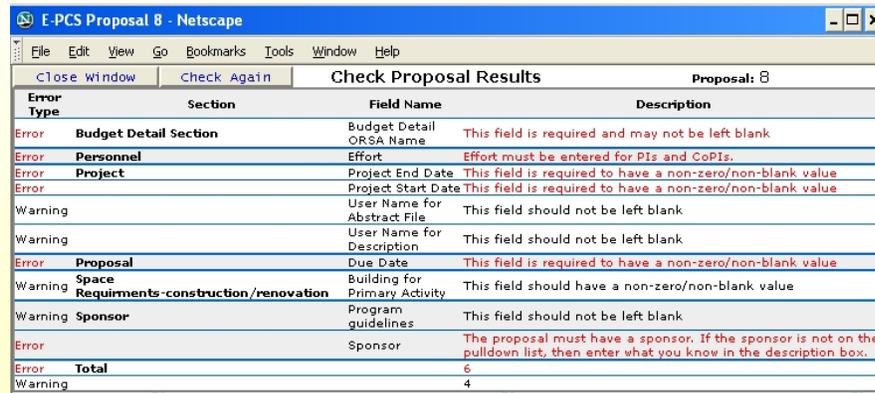
Macintosh and other non-windows users should append file type extensions to the names of files being uploaded.

Once you've uploaded a file, you can view it by clicking the 'View' link.

If you wish to change the uploaded file, you must make changes in your local copy and then upload the new version.

If available, we recommend that you upload PDF documents, so that they can be viewed on a variety of computer platforms.

Checking a Proposal



Error Type	Section	Field Name	Description
Error	Budget Detail Section	Budget Detail ORSA Name	This field is required and may not be left blank
Error	Personnel	Effort	Effort must be entered for PIs and CoPIs.
Error	Project	Project End Date	This field is required to have a non-zero/non-blank value
Error	Project	Project Start Date	This field is required to have a non-zero/non-blank value
Warning		User Name for Abstract File	This field should not be left blank
Warning		User Name for Description	This field should not be left blank
Error	Proposal	Due Date	This field is required to have a non-zero/non-blank value
Warning	Space	Building for Primary Activity	This field should have a non-zero/non-blank value
Warning	Sponsor	Program guidelines	This field should not be left blank
Error		Sponsor	The proposal must have a sponsor. If the sponsor is not on the pulldown list, then enter what you know in the description box.
Error	Total		6
Warning			4

You may Check a proposal at any time. The check procedure will reveal if any required fields are not filled in. In addition, some simple data checking is performed to validate your data (example: a start date must be prior to an end date).

Errors will prevent the proposal from finalizing. Warnings are for your information, and will not stop finalization.

You can leave the window open while you make corrections, and recheck as necessary.

Checking a proposal can take up to a minute to respond - please be patient.

Finalizing a Proposal

Only the PI or a PI
delegate can finalize a
proposal.

The finalization is the
PI's certification and
signature.

As a security
precaution, the PI is
required to enter his or
her password at the
time of finalization.

The screenshot shows the E-PCS Home interface for a proposal titled "Determination of False Prime Numbers between 1 and 10". The user is Philip DepthHead3. The interface includes a navigation menu on the left with options like "Check Proposal", "Finalize", "Notes (0)", "Print/View Proposal", "Copy", and "Delete". The main content area contains the following text:

The Principal Investigator must FINALIZE AND CERTIFY THE PROPOSAL:

The Principal Investigator must "Finalize" the proposal once it is completed and ready for institutional review and approval. No changes can be made to the E-PCS record once it is finalized by the PI. All approvals from department heads, institute or center directors, deans and ORSA are based on the PI's finalized proposal.

By finalizing the proposal, the PI is providing his or her electronic signature on the application and certifying that:

1. the information provided in the proposal is accurate and complete;
2. they will comply with all applicable assurances and certifications referenced in the application;
3. they will assume responsibility for the design, execution and management of the project, including oversight for any subawardees;
4. they will comply with federal, state and institutional rules and regulations for all financial and administrative aspects of the award, including accountability for the appropriate use of any funds awarded.

To finalize and certify this proposal, enter your password: _____

(Finalization may take up to 15 seconds.)

Once the proposal is finalized, the system will send e-mail notifications to other approvers, who must then **login and approve** the proposal for it to be complete.

Logged in as: depthead3

Updated: 1/29/04 10:03 AM (depthead3)

For assistance contact ORSA at 541-346-5131 or email Research_Services@orsa.uoregon.edu

Once the proposal is finalized, it can not be edited.

After a proposal has been finalized, the only thing that can be changed are the approvers. You may not change anything else (note: the save buttons will not be on the screen).

If you must change an proposal after finalizing it, you will have to use the Revise/Replace option of the "Copy Proposal" function. You will have to go through the approval process again.

Copy/Replace/Revise

A proposal can be copied, creating a brand new proposal record. This is useful for continuations.

Specify the application type of the new record

After finalizing, a proposal can be copied, revised or replaced.

A revised or replaced proposal is linked to the original proposal.

The image shows two screenshots of the E-PCS system. The top screenshot shows a proposal record with a 'Copy' button circled in blue. The bottom screenshot shows the 'Copy/Replace/Revise' dialog box with the 'Application type' dropdown set to 'Non-Competitive Continuation' and the 'Copy/Replace' button circled in blue. A 'Finalized' status is also circled in blue in the bottom right corner of the dialog.

Copying will duplicate all of the information on a proposal (except approvals and key personnel) to a new record. You will have to specify the application type of the copied proposal, so it can be correctly linked to the existing proposal.

Prior to finalizing a proposal, it can only be copied.

After it is finalized, it can be Copied, Replaced or Revised.

Replacements and revisions are cross-linked with their original records, meaning that there will be a clickable link created so you can quickly navigate between the records.

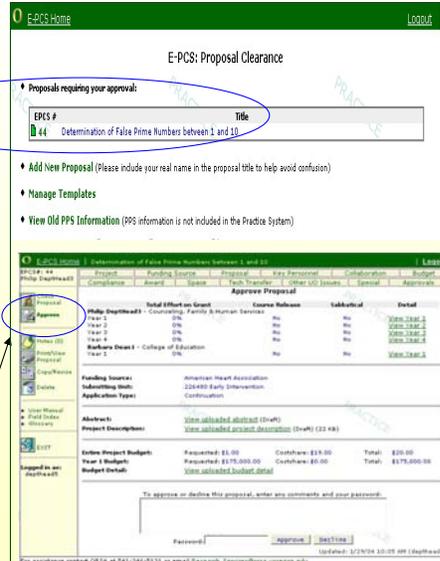
Approving a Proposal

An approver will see proposal(s) waiting for approval at the top of their menu

When the approver clicks the link in their e-mail or on the top of their menu, the system will direct them automatically to a summary page.

The summary page lists key points of the proposal.

The approver may also click any tab to view detailed information. When ready to approve or decline, clicking the "Approve" icon will return them to the summary page.



If you are the PI, CoPI, unit head, or other person with approval responsibility, you will receive an e-mail from Research Services indicating that a proposal is ready for your review. A hot link to the proposal is included in the e-mail.

After you are satisfied as to the contents of the proposal, click the Approve button. You will be required to then enter your password prior to Approving or Declining the proposal. The PI and DGA will receive immediate notification if the approval is declined.

End of Quicktour

- E-PCS has many more features not covered in the Quicktour. Please check all of the links and buttons in the [practice system](#) to see what they do
- If you have any additional questions that are not addressed here or in the User Manual, please contact our office for help
- Screen prints are helpful so we can see what you were looking at when you experienced problems

(541) 346-5131 [6-5131]
Research_Services@orsa.uoregon.edu